

Best Practices for Writing Program Titles, Descriptions, and Learning Objectives

Program Titles

Program titles are limited to 100 characters, including spaces. (If NAPFA has asked you to present a program that will offer IAR CEs, your title is limited to 40 characters.)

Program titles should accurately represent the course content and purpose and may not include trademarked names.

Program Descriptions

Descriptions should contain one paragraph of 5 sentences on (1) what your session will cover, (2) key topics or concepts that will be addressed, and (3) why this topic is timely and relevant to attendees.

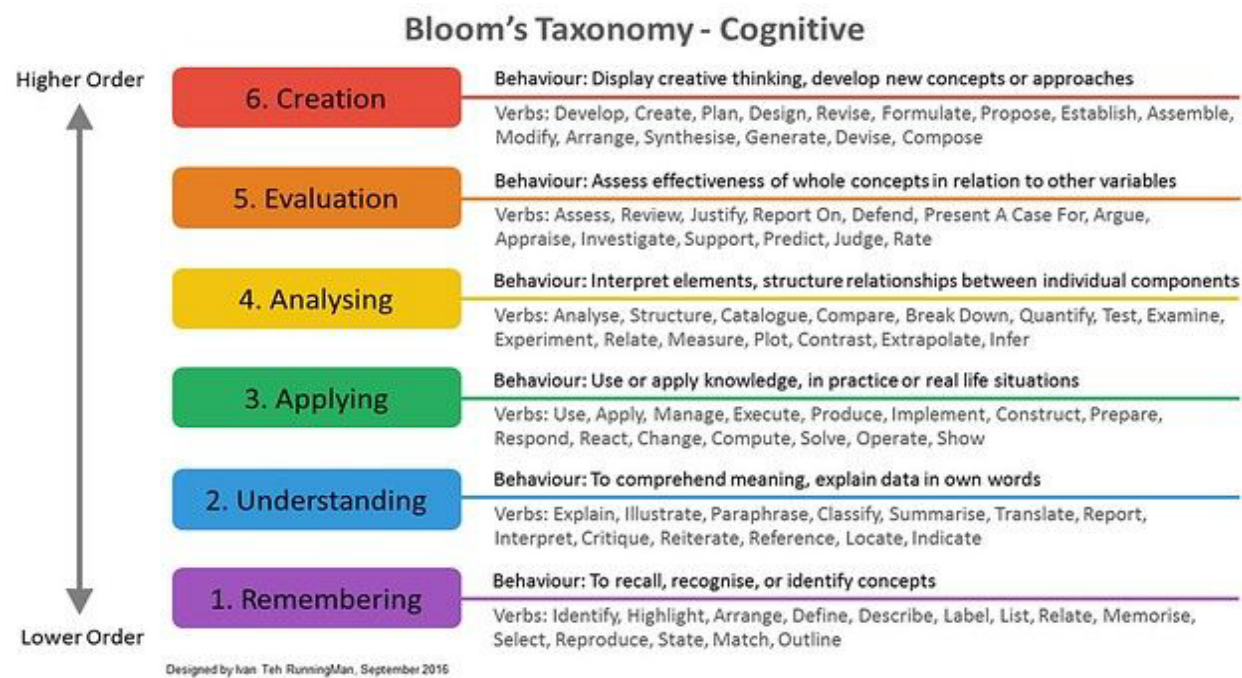
A program description should give a clear overview of the course, including topics to be covered and why this is important knowledge for a financial advisor to have at this time. The description should when appropriate include information on *how clients benefit* from an advisor having this knowledge, including any improvements in client outcomes, depth or breadth of guidance from the advisor, coordination, communications, etc.

Program Learning Objectives

Three learning objectives should be included for each hour of instruction.

Learning objectives differ from the program description. (Recall a college syllabus.) Learning objectives specify what a participant will learn in terms of knowledge, behaviors, skills, or actions and can either be demonstrated or be measured through an assessment

To search for examples of the learning objectives for similar courses that were accepted by CFP for CEs, go to [Continuing Education | CFP Board](#). The following summary of Bloom’s Taxonomy for writing learning objectives may also be helpful; it shows the six levels of learning developed by educational psychologist Benjamine Bloom, and the verbs associated with each level of behavior at right. The more difficult your course, the higher it is on the scale, and the more it will call on pre-requisite knowledge from lower levels:



ONLY if your program is being submitted for IAR CEs - Learning objectives should contain the following A-B-C-D elements: **Audience**, **Behavior**, **Condition**, and **Degree** (if applicable):

- Completing this course will allow **financial advisors** to apply financial therapy principles to guide clients struggling to make logical monetary decisions and deal with stressful financial issues as part of the advisor-client relationship.
- After this program, **the learner** will be able to prepare income statements that are accurately aligned with state and federal regulations.
- Upon completion of the course, **advisors** will be able to assess and revise existing financial plans based on asset division and tax returns for clients who have recently divorced

